

**RTO West Stage 2 Development Process
Billings and Settlements Group**

March 19, 2001 Work Tracking Document

Calendar

March 22 (Thursday)	8:30 a.m. to 3:30 p.m. (PST)	BLST Content Group Meeting	Hilton Garden Inn 12048 NE Airport Way.
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Attendance at 3/1/01 Meeting

Barry Bennett, Lori Blasedel, Don Brookhyser, Ed Brown, Tom DeBoer, Glen Brooks, Sue Furst, Jon Kaake, Roderick Kelley, Bud Krogh, Jerry Miller, Lauren Nichols, Steve Parks, Leslie Pompel, John Underwood, Tami White

Assignments from 3/1/01 Meeting

Responsible Person	Task	Status
Warren Clark & Jerry Miller	Review and revise Desert Star Appendix G.1: Applicability	First draft complete; update based on March 1 discussion by March 15; will lead further discussion on March 22
Tami White	Obtain a menu of services/products from Pricing CG; track with G.1	By March 15
Lauren Nichols, Connie Howard, Leslie Pompel	Review and revise Desert Star Appendix G.2: Administration	Revised first draft; will lead further discussion on March 22
Tami White, Lisa Grow	Review and revise Desert Star Appendix G.3: Information Required for Settlement and Billing	Prepare draft by March 15
Pat Franklin	Review and revise Desert Star Appendix G.4: Calculation, Assignments and Pricing of Unaccounted for Energy	Identified four factors in UFE; prepare draft by March 15
	Review and revise Desert Star Appendix G.5: Distribution and Transmission Losses	Awaiting general discussion and resolution of losses issue
Lauren Nichols, Connie Howard, Leslie Pompel	Review and revise Desert Star Appendix G.6: Monthly Invoice and Payment	Incorporated into G.2
Gary Dahlke, Pam Jacklin,	Prepare credit issues paper	Completed

Barry Bennett, Jon Kaake		
Tami White & Tom DeBoer	Review and revise Desert Star Appendix G.7: Payment to Participating Tos of Amounts Due	Awaiting determination of credit risk issue
Don Brookhyser	Review and revise Desert Star Appendix G.8: Late Payment and/or Non-Payment of Invoices	Revised first draft
Sue Furst	Review and revise Desert Star Appendix G.9: Settlement and Billing Disputes	Revised first draft; Will lead discussion at March 22 meeting
Lauren Nichols, Connie Howard, Leslie Pompel	Review and revise Desert Star Appendix G.10: Review and Audit of Settlement Systems	Incorporated as section 2 f)
Lauren Nichols, Connie Howard, Leslie Pompel	Review and revise Desert Star Appendix G.11: Review and Audit of Data Provided to DSTAR	Incorporated as section 2 g)
Lauren Nichols, Connie Howard, Leslie Pompel	Review and revise Desert Star Appendix G.12: Net Billing	Incorporated as section 2 h)
Bud Krogh	Contact Operations Group to ask them to take on Appendix G.13: Inadvertent Accounting	Contacted Chris Elliott; Chris reviewed and revised G.13
Lauren Nichols	Update Timeline	On-going
Don Brookhyser	Review issue of the confidentiality of billing information	On-going
Ed Brown	Review BLST issues as they relate to BC	Legal team trying to map transactional flows resulting from agreements between BCIGO and RTO, but too early to identify issues affecting BLST
Don Brookhyser	Compare 2/9 DSTAR draft with CalISO and PJM language con confirm that DSTAR draft is complete	Completed-Confirmed that DSTAR draft is complete
Ed Brown	Check capitalizations, definitions, and accuracy of the number of business days set out in appendix and timeline	Put together table containing terms from several sources, will update further after March 22 meeting; reviewed accuracy of business days but is waiting to see next draft before ensuring they tie together in appendix; put

		together key activities and due dates contained in DSTAR appendix
Sue Furst	Cross-check what is in the metering appendix re. "Settlement Ready Information" to make sure nothing is omitted/incorrect	After March 22 meeting

Billings and Settlements Participant Roster as of March 5, 2001

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